NFC

Procedures

National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

Updated August 2004

Retirement Processing System (RETM)

PC Products

Optical Storage

CD-ROM

NFC Procedures
National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

User Documentation For Systems And Processes

PC Products

TITLE I
Payroll/Personnel Manual

CHAPTER 9
Retirement Procedures

SECTION 2
Retirement Processing System (RETM)

Latest Update Information

The Retirement Processing System (RETM) procedure (Title I, Chapter 9, Section 2) dated August 2004, was converted from a 2-column to 1-column format. The content of the procedure remains the same. As a result of this conversion, some shifting in text has occurred.

This converted document is hyperlinked for easy navigation. To find information, just search the **Table Of Contents** or the **Heading Index** and then click the listing to jump to the corresponding text. You can also use the word search feature in Adobe Acrobat.

Note: When you are jumping from topic to topic, you may need to set Acrobat's zoom feature to view full pages. Otherwise, if the topic you are jumping to is in the lower part of the page, you will have to scroll to locate it. For instructions on using the zoom feature, see Adobe Acrobat's online help.

For information about this publication, please contact Government Employees Services Branch at **504-426-1051** .

Table Of Contents

About This Procedure

This procedure provides instructions for accessing and operating the Retirement Processing System (RETM). The following information will help you to use the procedure more effectively and to locate further assistance if needed.

How This Procedure Is Organized

The primary sections of this procedure are described below:

System Overview describes what the system is used for and provides related background information.

System Access provides access security information and instructions for accessing the system.

Operating Features describes the system's design and how to use its operating features.

Instructions for using the **Main Menu** and **Options** are provided separately depending on your access level. All functions within an option are covered before going to the next option on the main menu. The menu and option screens are presented as figures within the text.

Exhibits include illustrations such as examples of reports, edit messages, and help screen.

What Conventions Are Used

This procedure uses the following conventions:

Convention	Example
Messages displayed by the system are printed in *italics.*	The message *Retirement Tracking Record Stored* is displayed.
Data that is system generated or that you must key in exactly as shown is printed in **`bold italics`**.	Key in **`U`**.
Emphasized text within a paragraph is printed in **bold**.	Add pertinent data into RETM **before** sending the package to NFC.
Figure references printed in bold link the figures with the text.	The CSRS/FERS Forms Inquiry screen (**Figure 7**) is displayed.
For all RETM screens, the fields displaying zeros (0) are numeric.	SSNO: 000000000.
Keyboard references are printed in bold inside brackets.	Press **[Enter]**. Press **[PF2]**.
Important extra information is identified as a note.	**Note:** Fields displaying zeros (0) are numeric.
Optional actions at the end of a processing function are preceded by bullets.	• To view additional records for the same employee, press **[PF8]**.
Field specifications are also printed in italics. **Note:** Field entries are identified as *required[1]*, *conditional[2]*, *optional[3]*, *optional default[4]*, or *no entry[5]*.	**SSNO** *Required, numeric, 9 positions* Key in the employee's social security number

[1]Required	You must enter data in the field. (Note: All required fields on CLER pages are marked with * to distinguish required entries from optional entries. The required fields must be completed to avoid rejection.)
[2]Conditional	You may be required to enter data based on criteria indicated in the field instructions.
[3]Optional	You may elect to enter data in the field. If the field is left blank, no data is system generated.
[4]Optional default	You may elect to enter data. If the field is left blank, the system generates a default entry.
[5]No entry	You do not enter data in the field. The field instruction states the reason for no entry.

Who To Contact For Help

For questions about this procedure, contact the Directives and Analysis Branch at **504-255-5322** .

For questions about the system (including help with unusual conditions or obtaining access authority), contact Information Center personnel at **504-255-5230** .

For questions about processing retirement documents contact the Payroll/Personnel Operations Section at **504-255-4729** .

System Overview

The Retirement Processing System (RETM) external procedure provides instructions for agency personnel offices to track the processing of applications for retirement benefits in the event of an employee's (1) retirement, (2) death, or (3) separation with a request for a refund of retirement contributions. RETM is an online data processing system of the U.S. Department of Agriculture.

RETM provides personnel offices with the capability of adding, modifying, reporting, querying a RETM tracking record, and printing a paper version of the Individual Retirement Record, SF-2806 (CSRS)/SF-3100 (FERS).

Note: The Individual Retirement Record can be generated for employees at any time during employment.

Agency personnel offices accept employees' applications. These applications along with other related documents (e.g., health and life insurance) are reviewed by the agency personnel offices. (See Title I, Payroll/Personnel Manual, Chapter 9, Section 1, Processing Retirement Documents.) It is essential that personnel offices enter retirement actions in the Payroll/Personnel System as soon as they are received to allow time for processing. The agency personnel offices then enter pertinent data into RETM to track the employee's application before sending the retirement package to NFC.

NFC processes these applications and submits them, along with the official SF-2806/SF-3100, to the Office of Personnel Management (OPM) within 30 days of the employee's separation date. Therefore, it is essential for agencies to submit the retirement package as soon as possible to meet the required timeframe mandated by OPM. If actions are entered in the system late, processing is delayed.

NFC personnel review the applications and related documents to ensure that they are properly completed. Additional data needed to track the processing of the application is also entered into RETM by NFC personnel, which updates the RETM records.
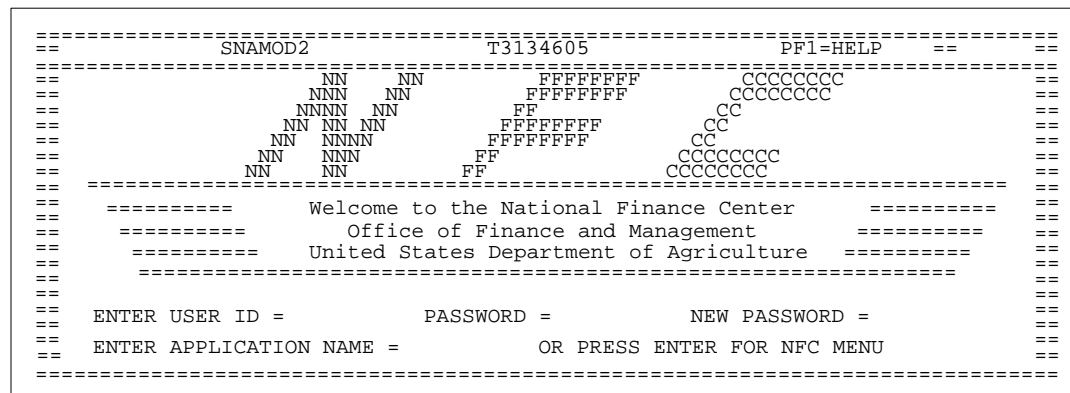
System Access

The following paragraphs provide information about accessing RETM, including remote terminal usage, sign-on, and sign-off instructions.

Remote Terminal Usage And Security

For specific information about security for systems access, individual user identification and password, use of master control and directional keys, see Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 1, Remote Terminal Usage. For information about connecting to and disconnecting from your telecommunications network, see the instructions that are provided with your specific network.

Sign-On

Once you are connected to your telecommunications network, the NFC banner screen (**Figure 1**) is displayed.

```
================================================================================
==           SNAMOD2                    T3134605                 PF1=HELP    ==      ==
================================================================================
==              NN      NN       FFFFFFFF          CCCCCCCC                  ==      ==
==              NNN     NN       FFFFFFFF         CCCCCCCC                    ==      ==
==              NNNN    NN          FF               CC                       ==      ==
==              NN NN NN          FFFFFFFF            CC                       ==      ==
==              NN   NNNN        FFFFFFFF            CC                        ==      ==
==              NN     NNN          FF            CCCCCCCC                     ==      ==
==              NN      NN          FF            CCCCCCCC                     ==      ==
==   ====================================================================     ==      ==
==                                                                            ==      ==
==     =========       Welcome to the National Finance Center     =========  ==      ==
==      =========         Office of Finance and Management        =========  ==      ==
==       =========     United States Department of Agriculture   =========   ==      ==
==        ================================================================    ==      ==
==                                                                            ==      ==
==                                                                            ==      ==
==   ENTER USER ID =          PASSWORD =           NEW PASSWORD =             ==      ==
==                                                                            ==      ==
==   ENTER APPLICATION NAME =            OR PRESS ENTER FOR NFC MENU          ==      ==
================================================================================
```

Figure 1. NFC Banner Screen

Respond to the prompts as follows:

Enter User ID   *required, alphanumeric, 5 positions*

Key in your user ID (e.g., **NF999**).

Password   *required, alphanumeric, 6 to 8 positions*

Key in your password (your user password is not displayed on the screen).

New Password   *optional, alphanumeric, 6 to 8 positions*

This field is used when your current password has expired and the system requests a new password. However, you may change your password at any time (but not more than once daily) by keying in a new password.

Enter Application Name   *required, alphanumeric, 4 positions*

Key in **RETM** and press **[Enter]**.

The Agency Tracking Menu (**Figure 4**) is displayed, except when NFC needs to communicate special system function messages. In this case, the Electronic Access Bulletin Board is displayed. Read the message(s) shown and press **[Enter]**. The NFC Menu (**Figure 2**) is displayed.

```
================================================================================
==  XX/XX/XX       SNAMOD2          NFC MENU          T3134806      15:12:50  CT    ==
================================================================================
==                                                                            ==
==   SELECT ONE:                                                              ==
==      1. PAYROLL/PERSONNEL SYSTEMS                                          ==
==      2. FINANCIAL INFORMATION SYSTEMS                                      ==
==      3. PROPERTY MANAGEMENT INFORMATION SYSTEMS                            ==
==      4. ADMINISTRATIVE INFORMATION SYSTEMS                                 ==
==      5. DEVELOPMENT SYSTEMS   <NFC ONLY>                                   ==
==      6. DATA BASE TEST SYSTEMS  <NFC ONLY>                                 ==
==      7. MISSION ASSIGNMENT TRACKING SYSTEM  <GAO ONLY>                     ==
==      8. DIRECTIVES BULLETIN BOARD                                          ==
==                                                                            ==
==   ENTER APPLICATION NAME OR SELECTION NUMBER ==>            PF11 = EXIT     ==
================================================================================
==                                                                            ==
==                            MESSAGE BOARD                                   ==
================================================================================
```

Figure 2. NFC Menu

Press **[Enter]** again to display the Agency Tracking Menu (**Figure 4**).

Note: You may also select Option 8, Directives Bulletin Board, on the NFC Menu, to view additional payroll/personnel related messages. (See Title VI, Systems Access Manual, Bulletin 94-1, Directives Bulletin Board, dated January 24, 1994.)

Sign-Off

To exit RETM at any time, press **[Clear]**. The *Enter Next Task Code* prompt is displayed (**Figure 3**).

```
   Enter Next Task Code

   bye
```

Figure 3. Enter Next Task Code Prompt

Key in **bye** and press **[Enter]**. You are now disconnected from RETM but are still connected to the NFC mainframe.

To disconnect from the mainframe, press **[PF11]** or compatible function key(s). You are returned to the NFC banner screen (**Figure 1**).

To avoid unnecessary charges, disconnect from your telecommunications network immediately once a session is terminated. (See Title VI, Chapter 2, Section 1, Remote Terminal Usage.)

Operating Features

This section describes the system's design and operating features.

System Design

RETM consists of one menu and four options (actions) for maintaining and retrieving data. The key field in each data record is the SSNO field. This field is used to access data for a specific record after the record is entered in the data base.

Help Screen

The Help screen is available for all entry fields displayed on the Report Generation Help Screen. To obtain the Help screen from the Report Generation Screen, position the cursor on the field in question and press [PF5]. The Help screen is displayed and provides a description of the field either in narrative format or by listing the valid entry codes. Press [PF5] to return to the previous screen.
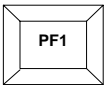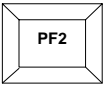
System Edits

RETM performs edit and/or validity checks on entered data, as applicable. If the data does not pass system edits, errors are highlighted, and an error message appears at the bottom of the screen. All errors must be corrected before the record can be updated.
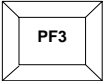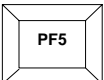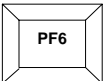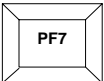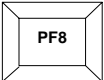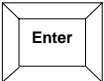
Function Keys

The program function keys are used to access RETM options. How these keys are identified depends on the equipment being used. Other function keys include **[Enter]** [Clear], and [Tab]. For detailed instructions on your equipment usage, see the appropriate manufacturer's operating guide. The functions of applicable PF keys are displayed at the bottom of each screen.

Function keys used in RETM are as follows:

Function Keys

Key	Description
PF1	Used to return to the RETM menu screen.
PF2	Used to refresh the screen, which clears all data entered on the screen.

Function Keys

Key	Description
PF3	Used to add a tracking record in RETM.
PF4	Used to update a tracking record already established in RETM. Used to display the CSRS/FERS Forms Inquiry screen.
PF5	Used to display the Help screen and return to the previous screen.
PF6	Used to submit the command to print the paper version of the Individual Retirement Record, SF-2806 (CSRS)/ SF-3100 (FERS).
PF7	Used to display the previous record stored, if multiple records exist for the same employee.
PF8	Used to display the next record stored, if multiple records exist for the same employee.
Enter	Used to display the next applicable screen from the RETM menu. Used to display data for a new record on the inquiry screen. Used to submit a report.
Clear	Used to exit the system.
Tab	Used to move the cursor from field to field.

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Agency Tracking Menu

After you have accessed RETM, the Agency Tracking Menu (**Figure 4**) is displayed. This is RETM's main menu and provides four action options.

```
   RM00011M          USDA - OFM - NATIONAL FINANCE CENTER
                     RETIREMENT PROCESSING SYSTEM -- RETM
                          AGENCY TRACKING MENU

                            ACTION CODES

                         UPDATE (ADD/MOD) = U
                         INQUIRY          = I
                         PRINT RETM CARD  = P
                         REPORTS          = R


                           PLEASE ENTER:

                         ACTION CODE:
                         SSNO:          000000000



   CLEAR=EXIT   ENTER=NEXT SCREEN
```

Figure 4. Agency Tracking Menu

Following is a brief description of each option:

Update (Add/Mod) (Option U) - Used to add or modify a tracking record in RETM.

Inquiry) (Option I- Used to query (view) an existing tracking record in RETM.

Print RETM Card (Option P) - Used to print the paper version of the Individual Retirement Record, SF-2806/SF-3100.

Reports (Option R) - Used to generate a report.

Note: To delete a record, contact NFC's Fringe Benefits Processing Unit at **504-255-5332** .

To select an option, complete the fields as follows:

Action Code

required, alpha, 1 position

Key in the appropriate code: **U**, **I**, **P**, or **R**.

SSNO

required, numeric, 9 positions

Key in the employee's social security number. Press **[Enter]**.

Note: For all RETM screens, the fields displaying zeros (0) are numeric.

Instructions to update (add or modify) a record, query a record, print the Individual Retirement Card and request reports are provided separately in the following pages.

Update (Add/Modify)

Update (Add/Modify) is the first option on the Agency Tracking Menu (**Figure 4**). This option is used to add a new tracking record or modify an existing record. To select and use the update option, follow the instructions below.

Adding A Tracking Record

At the Agency Tracking Menu (**Figure 4**), key in **U** at the *Action Code* prompt and key in the employee's social security number at the SSNO prompt. Press **[Enter]**. The Personnel Office - Application Tracking screen (**Figure 5**) is displayed.

```
RM06010M          U S D A  -  O F M  -  NATIONAL FINANCE CENTER
                  RETIREMENT TRACKING SYSTEM - ADD / MODIFY
                    PERSONNEL OFFICE - APPLICATION TRACKING
SSNO     123456789
NAME     LAST                    FIRST                 MIDDLE
AGENCY/POI    0000        SEPARATION DATE    00 00 00    NATURE OF ACTION
     DATE APPLICATION RECEIVED PERSONNEL    00 00 00
     DATE APPLICATION SENT TO NFC           00 00 00

     SELECT TYPE APPLICATION  00          RETIREMENT COVERAGE CODE
     01 = AGE
     02 = OPTIONAL
     03 = EARLY OPTIONAL
     04 = DISCONTINUED SERVICE
     05 = SEPARATION (NFC USE ONLY)
     06 = PRELIM DISABILITY
     07 = FINAL
     08 = DEATH
     09 = SUPPLEMENTAL (NFC USE ONLY)
     10 = SEPARATION (REFUND)
     11 = ATTACHMENT (NFC USE ONLY)

CLEAR=EXIT PF1=MENU PF2=REFRESH PF3=ADD PF4=MODIFY PF7=PREV REC PF8=NEXT REC
```

Figure 5. Personnel Office - Application Tracking Screen

Complete the fields as follows:

SSNO

numeric, 9 positions

This field is system generated from the Agency Tracking Menu screen.

Name

alpha, 41 positions max.

This field is system generated.

Agency/POI

alphanumeric, 6 positions max.

These fields are system generated.

Separation Date

numeric, 6 positions

This field is system generated after the separation personnel action is entered into the Personnel Action Processing System (PACT) and applied to the Payroll/Personnel System data base.

Nature of Action	*numeric, 3 positions*
	This field is system generated after the separation personnel action is entered into PACT and applied to the Payroll/Personnel System data base.
Date Application Received Personnel	*required, numeric, 6 positions*
	Key in the date the agency personnel office received the employee's application in month/day/year sequence.
Date Application Sent To NFC	*required, numeric, 6 positions*
	Key in the date the agency personnel office sent the employee's application to NFC in month/day/year sequence.
Select Type Application	*required, numeric, 2 positions*
	Key in the appropriate type of application being filed, using the list on the screen.
Retirement Coverage Code	*alphanumeric, 1 position*
	This field is system generated.

After completing all data entry, press **[PF3]** to add the record to RETM. The message *Retirement Tracking Record Stored* is displayed at the bottom of the screen. To add another record, press **[PF2]**; otherwise, press the applicable key as displayed at the bottom of the screen.

Modifying A Tracking Record

At the Agency Tracking Menu screen (**Figure 4**), key in **U** at the *Action Code* prompt and key in the employee's social security number at the SSNO prompt. Press **[Enter]**. The Personnel Office - Application Tracking screen (**Figure 5**) is displayed showing the latest data for the selected employee.

Note: The only fields that may be modified are - Date Application Received Personnel and Date Applications Sent To NFC.

To modify the record, key in the new data over the data on the screen in accordance with the entry instructions provided for Adding a Tracking Record. Press **[PF4]**. The message *Retirement Tracking Record Modified* is displayed at the bottom of the screen.

To modify another tracking record, press **[PF2]**. The screen is cleared for entry of another social security number.

After completing all modifications, press the applicable key as displayed at the bottom of the screen.

Inquiry

Inquiry is the second option on the Agency Tracking Menu (**Figure 4**). This option is used to query (view) tracking records on file for an employee.

To select this option, key in **I** at the *Action Code* prompt and key in the employee's social security number at the SSNO prompt on the Agency Tracking Menu screen (**Figure 4**). Press **[Enter]**. The Application Tracking - Inquiry screen (**Figure 6**) is displayed showing the latest data for the selected social security number.

```
                    U S D A  -  O F M  -  NATIONAL FINANCE CENTER
   RM07010M                                                            XX/XX/XX
                        RETIREMENT TRACKING SYSTEM -- RETM
                           APPLICATION TRACKING - INQUIRY

   SSNO    123456789
   NAME:    LAST                    FIRST                 MIDDLE
   AGENCY/POI     0000   EMPLOYEE SEPARATION DATE 00 00 00 NATURE OF ACTION
   SEPARATION PAY PERIOD AND YEAR 00 / 0000   TYPE CASE 00
   CURRENT YEAR DEDUCTIONS           .00        CUMULATIVE DEDUCTIONS       .00

   DATE APPLICATION RECEIVED IN PERSONNEL   00 00 00

   DATE APPLICATION SENT TO NFC             00 00 00

   DATE APPLICATION RECEIVED AT NFC         00 00 00

   DATE PERSONNEL ACTION APPLIED            00 00 00

   DATE APPLICATION/RETIREMENT RECORD SENT TO OPM   00 00 00  REGISTER NO.
    NUMBER OF PROCESSING DAYS    000
    CLEAR=EXIT PF1=MENU   ENTER=NEW RECORD PF4=FORMS  PF7=PREV REC PF8=NEXT REC
```

Figure 6. Application Tracking - Inquiry Screen

Note: This screen includes data that was entered not only by agency personnel offices but also by NFC personnel.

NFC enters additional data into RETM to assist agencies in tracking an employee's application. Data entered by NFC on the first inquiry screen includes (1) the employee's current yearly and cumulative deductions while payrolled by NFC, (2) the date the employee's application was received at NFC, (3) the date the personnel action was applied to the Payroll/Personnel data base, (4) the date the application was sent to OPM, (5) the register number, and (6) the number of days it took to process the action.

To access additional data on the second inquiry screen, CSRS/FERS Forms - Inquiry screen (**Figure 7**), press **[PF4]**. Additional data entered by NFC includes the missing forms information.

```
RM07011M                    RETIREMENT TRACKING SYSTEM -- RETM
                              CSRS/FERS FORMS   INQUIRY

   SSNO  111223333   EMPLOYEE   DOE                 SEP CASE TYPE   02
   DATE APPLICATION RECEIVED AT NFC          00 00 00

                                    MISSING FORMS RECVD (MO DA YR)
                        FORM NAME             MO DA YR




CLEAR=EXIT  PF1=MENU  PF4=CASE SCRN    PF7 PREV FORM SCRN  PF8=FORMS SCRN CONT
```

Figure 7. CSRS/FERS Forms - Inquiry Screen

- To view additional records for the same employee, press **[PF8]**.

- To view a record for another employee, key in the next social security number over the existing number on the first inquiry screen. Press **[Enter]**. The data for the selected social security number is displayed.

- To view additional records, repeat this process; otherwise, press the applicable key as displayed at the bottom of the screen.

Print RETM Card

Print RETM Card is the third option on the Agency Tracking Menu (**Figure 4**). This option is used to print a paper version of the Individual Retirement Record, SF-2806/SF-3100. The Individual Retirement Record can be generated for employees at any time during their employment. A sample of an SF-3100 is provided as **Exhibit 1** to this procedure. NFC generates the *official* Individual Retirement Record (hard copy) that is sent to OPM.

The SF-2806/SF-3100 depicts information regarding retirement contributions. Therefore, time worked by employees under an appointment not contributing to retirement would not be shown on the SF-2806/SF-3100. Also, for departments converting to NFC's Payroll/Personnel System, deductions depicted on the SF-2806/SF-3100 begin at the time of conversion.

USDA agencies that converted to NFC's Payroll/Personnel System have the remarks, Brought Forward, displayed under Fiscal Record on the paper version SF-2806/SF-3100. Brought Forward indicates the employee's previous retirement contributions before conversion.

To select the print option, key in *P* at the Action Code prompt. Press **[Enter]**. The Print Screen (**Figure 8**) is displayed. If an employee's social security number was entered at the *SSNO* prompt on the Agency Tracking Menu, it is automatically displayed.

```
   RM04050M                    NATIONAL FINANCE CENTER
                         RETIREMENT PROCESSING SYSTEM -- RETM
                                 PRINT SCREEN

                              PRINT INFORMATION
   JOB CHARACTER: A                          SYSTEM OUTPUT CLASS:  A
   DELIVERY INFO:                            REMOTE PRINTER ID:

     SSNO               SSNO                 SSNO               SSNO
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000
   000000000          000000000          000000000          000000000

   CLEAR=EXIT  PF1=MENU  PF6=SUBMIT
```

Figure 8. Print Screen

Complete the fields as follows:

Job Character — *optional, alpha, 1 position*

A is system generated and added to the job name to assist in identifying the printout. Another alpha character (**A**-**Z**), however, can be keyed in over the *A*.

System Output Class — *alpha, 1 position*

A is system generated to designate a request for a printed copy. (See **Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 2, Interactive System Productivity Facility (ISPF)**, for additional information on viewing a document.)

Delivery Info — *required, alphanumeric, 20 positions max.*

Key in information to designate where the output job should be delivered (e.g., **John Doe, Room 125**).

Remote Printer ID — *required, alphanumeric; 16 positions max.*

Key in the number of the printer designated to print the Individual Retirement Record.

SSNO — *optional, numeric, 9 positions*

The social security number entered on the Agency Tracking Menu (**Figure 4**) is automatically displayed. If you want to change the SSNO, type over the existing number. This screen can accommodate 48 social security numbers. Key in additional social security numbers, if applicable.

Press **[PF6]** to submit the job. The message *JOB NFXXXA Submitted* is displayed at the bottom of the screen. All of the SSNO data fields are cleared and zeros are displayed in preparation of additional entries.

If no other entries are required, press the applicable key as displayed at the bottom of the screen.

Reports

Reports is the fourth option on the Agency Tracking Menu (**Figure 4**). This option is used to request any one of three RETM reports.

The Department Summary Report, (**Exhibit 2**), lists, by department and agency, the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Agency/Bureau Summary Report, (**Exhibit 3**), lists, by agency (including serviced agencies), the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Personnel Office Identifier (POI) Summary Report, (**Exhibit 4**), lists the separated individuals names within a POI and the number of processing days between the separation date and the date submitted to OPM.

To select this option, key in **R** at the *Action Code* prompt. Press **[Enter]**. The Report Generation Screen (**Figure 9**) is displayed.

```
   RM04100M           U S D A, O F M, NATIONAL FINANCE CENTER      08/04/00
                            REPORT GENERATION SCREEN

        DEPARTMENT:        AGENCY/BUREAU:            POI:

                     TIME PERIOD   000000     TO    000000

                   1.   DEPARTMENT SUMMARY REPORT

                   2.   AGENCY/BUREAU SUMMARY REPORT

                   3.   POI SUMMARY REPORT

                  SELECT REPORT NO.


   DELIVERY INFORMATION:                          NUMBER OF COPIES: 1
   SYSTEM OUTPUT CLASS : A                         REMOTE PRINTER ID:


     CLEAR=EXIT    PF1=MENU   PF5=HELP    ENTER=SUBMIT JOB
```

Figure 9. Report Generation Screen

Complete the fields as follows:

Department   *required, alpha, 2 positions*
                                   Key in the department code.

Agency/Bureau   *required, alphanumeric, 2 positions*

Key in the agency or bureau code.

POI   *optional for Report Nos. 1 and 2, required for Report No. 3, numeric, 4 positions*

Key in the personnel office identifier code.

Time Period   *required, numeric, 6 positions*

Key in the beginning date of the report in month, day, year sequence.

To   *required, numeric, 6 positions*

Key in the ending date of the report in month, day year sequence.

Select Report No.   *required, numeric, 1 position*

Key in the desired report number.

Delivery Information   *required, alphanumeric, 20 positions max.*

Key in information to designate where the generated report should be delivered (e.g., `John Doe, Room 125`).

Remote Printer ID   *required, alphanumeric, 16 positions max.*

Key in the number of the printer designated to print the report.

System Output Class   *optional, alpha, 1 position*

A is system generated to designate a printed report. For additional information on viewing a document, see **Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 2, Interactive System Productivity Facility (ISPF)**.

No. Of Copies   *required, numeric, 1 position*

Key in the number of copies desired.

Press **[Enter]**. The message *Job Submitted* is displayed at the bottom of the screen. To request additional reports, key in the new data over the existing data and press **[Enter]**.

If no other entries are required, press the applicable key as displayed at the bottom of the screen.

For assistance in completing these fields, move to the field in question and press **[PF5]** to display the Report Generation Help Screen (**Figure 10**).

```
RM04101M              U S D A, O F M, NATIONAL FINANCE CENTER        XX/XX/XX
                           REPORT GENERATION HELP SCREEN

DEPARTMENT     -   ENTER YOUR TWO POSITION DEPARTMENT CODE
AGENCY/BUREAU  -   ENTER YOUR TWO POSITION AGENCY/BUREAU CODE
POI            -   ENTER 4 DIGIT PERSONNEL OFFICE IDENTIFIER CODE
TIME PERIOD    -   ENTER THE BEGINNING AND ENDING DATES OF THE TIME PERIOD
                   THAT YOU WISH THE REPORT TO COVER.   DATES MUST BE IN MMDDYY
                   FORMAT.
SELECT REPORT NO. - ENTER 1, 2 OR 3 BASED ON WHICH REPORT YOU WANT PRINTED.
               1 - SUMMARY LIST BY DEPARTMENT THE NUMBER OF PROCESSING DAYS
               2 - SUMMARY LIST BY AGENCY THE NUMBER OF PROCESSING DAYS
               3 - SSNO LISTING OF EACH ACTION PROCESSED WITHIN A SPECIFIC POI
DELIVERY INFORMATION -   ENTER IDENTIFYING INFORMATION NEEDED TO DELIVER REPORT
                         TO YOUR LOCATION.
REMOTE PRINTER ID    -   ENTER YOUR REMOTE PRINTER ID.
SYSTEM OUTPUT CLASS  -   ENTER A IF REPORT SHOULD BE PRINTED AUTOMATICALLY. IF
                         YOU DESIRE TO VIEW REPORT FIRST REFER TO TITLE VI,
                         SYSTEMS ACCESS MANUAL, CHAPTER 2, SECTION 2.
NUMBER OF COPIES     -   ENTER NUMBER OF COPIES DESIRED. MAXIMUM IS 9.

     CLEAR=EXIT                  PF5=PREVIOUS SCREEN
```

Figure 10. Report Generation Help Screen

Reporting Through FOCUS

RETM is defined to the FOCUS Reporting System. For detailed instructions on accessing FOCUS, see Title VI, Systems Access Manual, Chapter 5, Report Generator Systems, Section 4, FOCUS Reporting System.

To retrieve RETM data, select the option for the Retirement Processing System (RETM) on the Payroll/Personnel Data Base Menu within the FOCUS Reporting System.

Two files are available in the FOCUS Reporting System for RETM. RETCLAIM contains information on employees, monies, personnel actions, military records, and remarks codes. RETMASTER contains information on claimants, forms, tracking, and missing documents.

To obtain a list of the FOCUS element names used for ad hoc reporting for the RETCLAIM and RETMASTR files, refer to **Title VI, Systems Access Manual, Chapter 5, Report Generator System, Section 4, FOCUS Reporting System**, Bulletin No. 87-1, FOCUS Listings Print Utility for instructions.

Exhibits

This sections presents the following exhibits:

Sample Of Individual Retirement Record SF-3100 (Paper Version)

Sample Of Department Summary Report

Sample Of Agency/Bureau Summary Report

Sample Of Personnel Office Identifier (POI) Summary Report

RETM Edit Messages

1. Sample Of Individual Retirement Record SF-3100 (Paper Version)

```
                                        ***INQUIRY - SF3100***
                        CARD   1

NAME:  LAST   FIRST   MIDDLE   DOB        SSNO
       DOE    JOHN    T        01 02 35   123 45 6789

       AGCY   PAY OFC   LOCATION   PAY OFC NO
       USDA   NFC       N.O. LA.   12-40-0001
                        XX-XXXX
```

SERVICE HISTORY

EFFECT DATE	ACTION	BASE PAY	REMARKS
3/29/87	TRANS CAREER	18358.00 GS-07	
4/12/87	REASSGNMENT	18358.00 GS-07	
4/12/87	PAY ADJ	18970.00 GS-07	
4/12/87	CORRECTION	18970.00 GS-07	
10/25/87	PAY ADJ REASSGNMENT	18358.00 GS-07	
11/08/87	CHG IN SCD	18358.00 GS-07	
11/21/87	TERM-APT IN	18358.00 GS-07	

FISCAL RECORD

YEAR	CAL SAL	YR DED	ACCUM SAL DED	REMARKS
1987	159.41	159.41		159.41 DED. BEGAN
1988	.00	159.41		3/29/87
1989	.00	159.41		SCD 01/05/85
1990	.00	159.41		PAY CEASED
1991	.00	159.41	0/00/00	NO UNUSED

```
DEDUCTIONS AND SERVICE        S/L BALANCE
CERTIFIED CORRECT
```

2. Sample Of Department Summary Report

DEPARTMENT SUMMARY REPORT RETIREMENT PROCESSING FOR PERIOD			PAGE 1	
XX XX XX THROUGH XX XX XX (DEPARTMENT WIDE)				
NUMBER OF DAYS BETWEEN SEPARATION DATE AND SUBMISSION TO OPM, BOYERS				
	0 - 28	29 - 58	OVER 58	TOTAL
AMS (02)	11	2	0	13
ANNUITIES	11	0	0	11
REFUNDS	0	1	0	1
DEATHS	0	1	0	1
ARS (03)	26	2	0	28
ANNUITIES	25	0	0	25
REFUNDS	0	1	0	1
DEATHS	1	1	0	2
ASCS (05)	9	1	0	10
ANNUITIES	9	0	0	9
REFUNDS	0	0	0	0
DEATHS	0	1	0	1
FMHA (07)	32	0	0	32
ANNUITIES	24	0	0	24
REFUNDS	4	0	0	4
DEATHS	4	0	0	4

Exhibits

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3. Sample Of Agency/Bureau Summary Report

AGENCY/BUREAU SUMMARY REPORT
RETIREMENT PROCESSING FOR PERIOD   PAGE   1
XX XX XX THROUGH XX XX XX
(AGENCY WIDE)

NUMBER OF DAYS BETWEEN SEPARATION DATE AND
SUBMISSION TO OPM, BOYERS

	0 - 28	29 - 58	OVER 58	TOTAL
5026	3	0	0	3
ANNUITIES	2	0	0	2
REFUNDS	1	0	0	1
DEATHS	0	0	0	0
5027	1	0	0	1
ANNUITIES	1	0	0	1
REFUNDS	0	0	0	0
DEATHS	0	0	0	0
5029	1	0	0	1
ANNUITIES	1	0	0	1
REFUNDS	0	0	0	0
DEATHS	0	0	0	0

4. Sample Of Personnel Office Identifier (POI) Summary Report

EMPLOYEE NAME	AG	SOC. SEC. NO.	TYPE APPLICATION	NO OF DAYS BETWEEN SEP. AND SUB. TO OPM
DOE, JANE	52	000112222	02	19
DOE, JOHN	53	000223333	06	19
SMITH, JANE	54	000334444	04	13

POI SUMMARY REPORT
RETIREMENT PROCESSING FOR PERIOD   PAGE   1
XX XX XX THROUGH XX XX XX
(POI 1531)

5. RETM Edit Messages

Message
Agency Code Must Be Entered
Bad Find On Claimant Record
Bad Obtain On Forms-Rcd
Control-Error On Table Search
Data Base Exception For Tables
Date Appl Mailed NFC Is A Required Field
Date Appl Recd Personnel Must Be A Valid Date
Date Sent to NFC Must Be Later Than Or Equal To Date Received Personnel
Department Code And Agency Code Do Not Agree
Dup Rec Exhausted
Employee Last Name Cannot Be Spaces
End Date Must Be MM/DD/YY Format
Enter SSNO For Next Request
Invalid Agency Code Entered
Invalid Key - Validate Agcy Code/POI
Job Submitted
Key In New SSNO, Press Enter
Modify Allowed On "Date Appl/Rcvd Per" & "Date Appl/Sent to NFC" After Init Input
Modify Not Allowed, Claim Has Been Processed And Forwarded To OPM
Modify Not Allowed, Type Application Of "5", "9", And "11" Are For NFC Use Only
Must Enter Delivery Information
Must Enter Job Character
Must Enter Remote Printer ID
Must Enter System Output Class
Must Press PF2 To Refresh Screen, Then PF3 To Store A New Tracking Record
Pers Off Ident Must Be Numeric
Please Enter An Agency Code
Press PF3 To Store New Tracking Record
Problem With Accessing Tracking Record - Contact Information Center - NFC
Problem With Transfer Back To Main Menu
Record Inactive - Error On Table Search
Report No. Must Be 1, 2, Or 3
Retirment Tracking Record Modified
Retirement Tracking Record Stored
Start Date Must Be MM/DD/YY Format
SSNO Must Be All Numeric
SSNO Not Within Your Security Access
SSNO Required

Message
POI is a required Numberic Field
Table Error - Request Not Complete
There Are More Than 12 Forms Missing For This SSNO - Only 12 Displayed On Screen
Tracking Record Does Not Exist For This SSNO
Unable To Modify, NOA And Eff Date Duplicate
Unable To Modify Retirement Tracking Record
Unable To Obtain Claimant Record
Unable To Obtasin Current Tracking Record
Unable To Store, Record Exists With Same Separation Date And Nature Of Action
Unable To Store Retirement Tracking Record
Valid Values For Employee Name Are Letters A Thru Z (i.e., Commas Not Allowed)
Valid Values For System Output Class Are A And X
Valid Values For Type Application Are 1, 2, 3, 4, 6, 7, 8, 10
Valid Values For Type Retirment Coverage Are "F" And "C"
Validate Selection Or Action Code

Exhibits

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

Heading Index